

VAULT CHECKLIST

Protect Your Important Documents

With unlimited secure document storage, you can organize and protect your most important documents. Review the checklist below and start adding to your Vault today!

LEGAL DOCUMENTS

- Wills
- Deeds
- Revocable and Irrevocable Trusts
- Power of Attorney
- Codicils (Supplements made to a Will)
- Living Wills/Health Directives
- Prenuptial Agreements
- Buy/Sell Agreements
- Contracts

BENEFITS

- Social Security Info
- Veteran's Administration Info
- Employment Benefits

INSURANCE POLICIES

- (Life, LTD, Disability, Medical, Car, Property)

BANK AND INVESTMENT STATEMENTS

- Pensions, IRAs, Annuities, etc.
- Investment Accounts
- Stock Options/Certificates

LIABILITIES

- List of Credit Cards with Contact Information
- Mortgages
- Loans

TAXES

- Tax Returns
- W-2 Forms



IDENTIFICATION

- Birth Certificates
- Drivers Licenses
- Passports
- Social Security Cards

FAMILY

- Adoption Papers
- Medical Records
- Marriage License
- Pictures
- Audio Files
- Video Clips

PROPERTY

- Titles to Homes, Autos, Boats, etc.
- Warranties



THRIVE
WEALTH STRATEGIES